

Prior ART

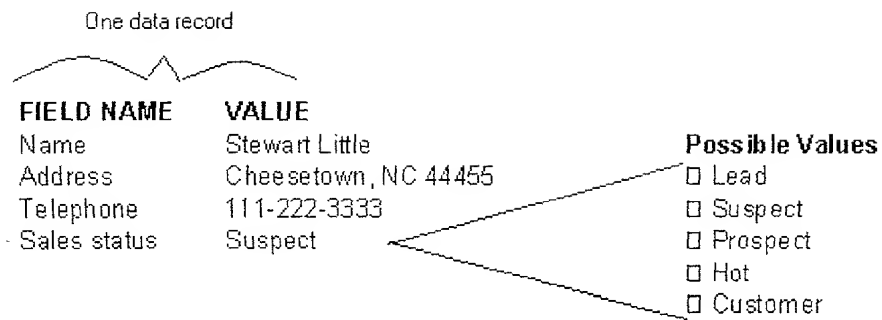


FIGURE 1

PRIOR ART

Name	Source of lead	Enjoys Sports	Enjoys Ballet	Smokes Cigars	Sales Cycle Status
Alice	Web	Yes	Yes	Yes	Suspect
Bobby	Call in	No	No	No	Lead
Joe	Direct Mail	Yes	No	No	Suspect
John	Web	No	Yes	Yes	Prospect
Mark	Direct Mail	No	No	Yes	Lead
Mary	Call in	Yes	No	Yes	Lead
Michael	Call in	No	Yes	No	Lead
Paul	Web	Yes	No	No	Lead
Peter	Web	No	Yes	Yes	Prospect
Raymond	Direct Mail	Yes	Yes	No	Hot Prospect
Rodney	Web	Yes	No	Yes	Lead
Samantha	Call in	Yes	No	No	Prospect
Sylvia	Call in	Yes	No	No	Suspect
Tracy	Web	No	Yes	No	Hot Prospect
Trent	Web	No	No	No	Suspect

FIGURE 2

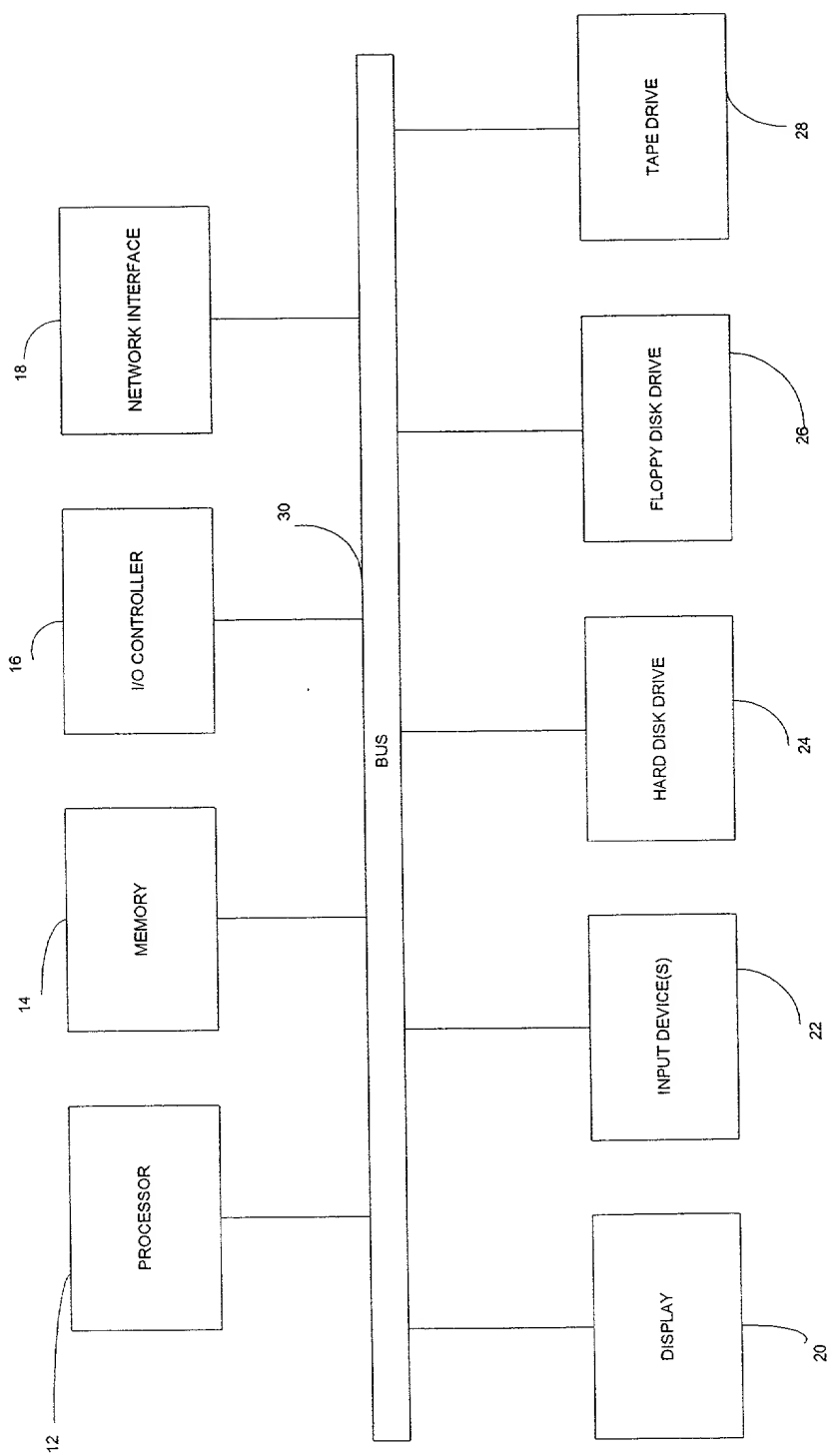


FIGURE 3

Arrayworks Engine

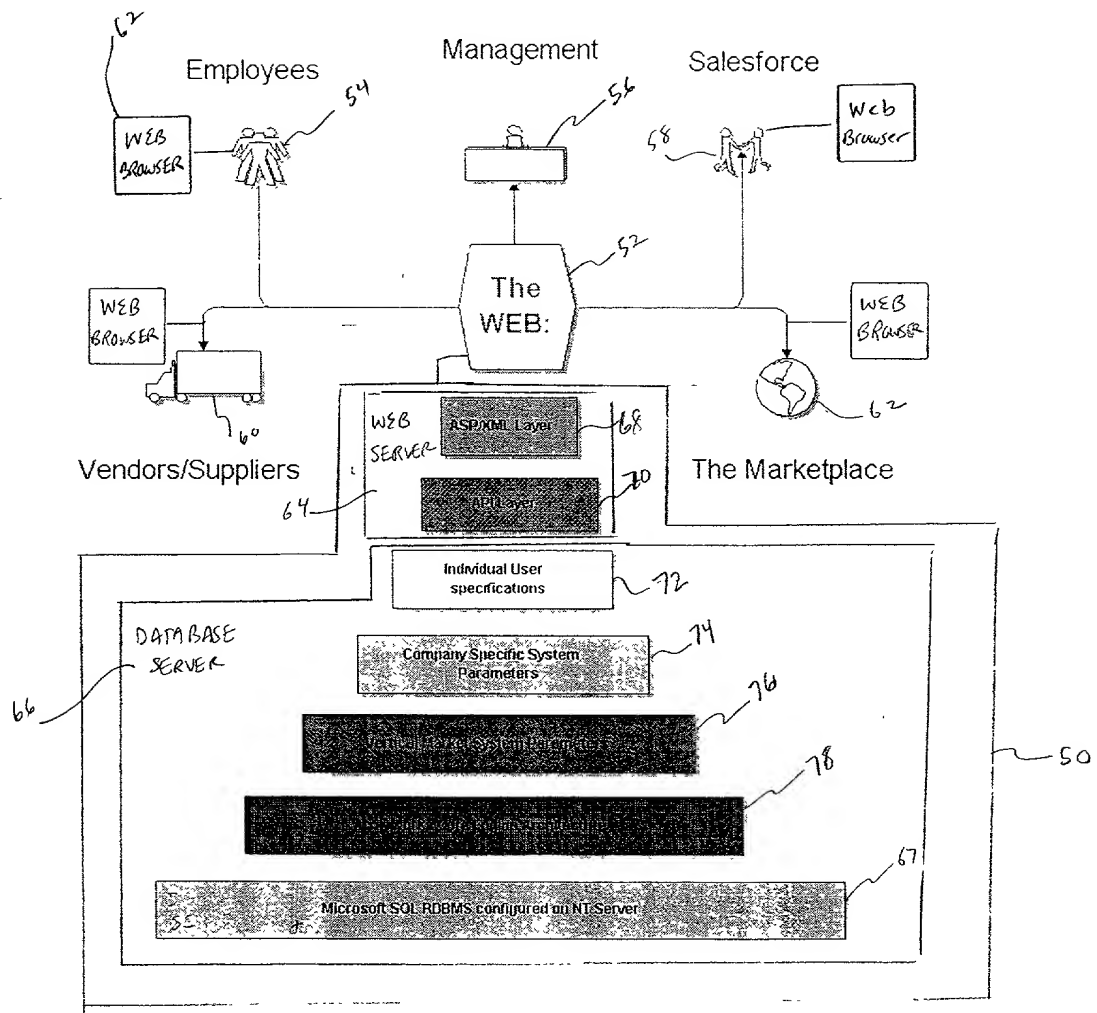


FIGURE 4.

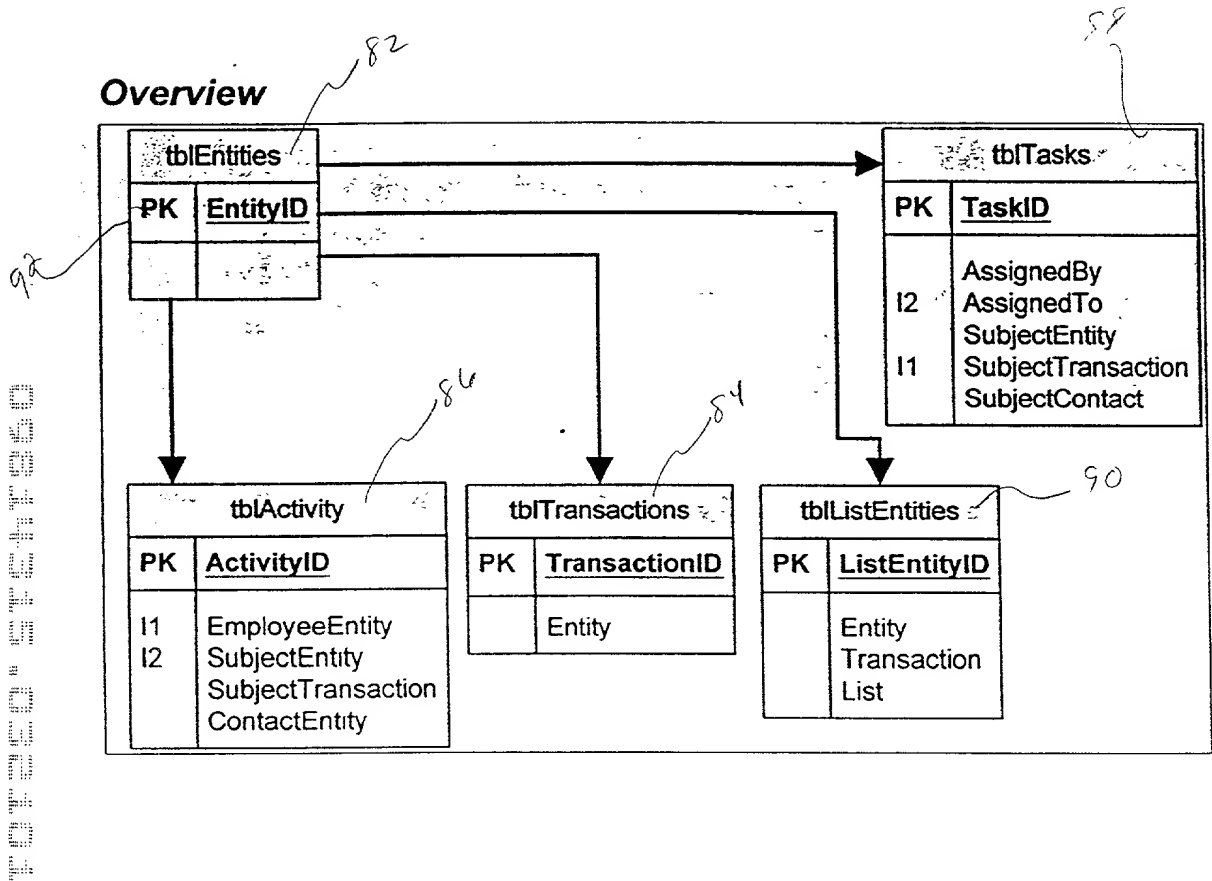
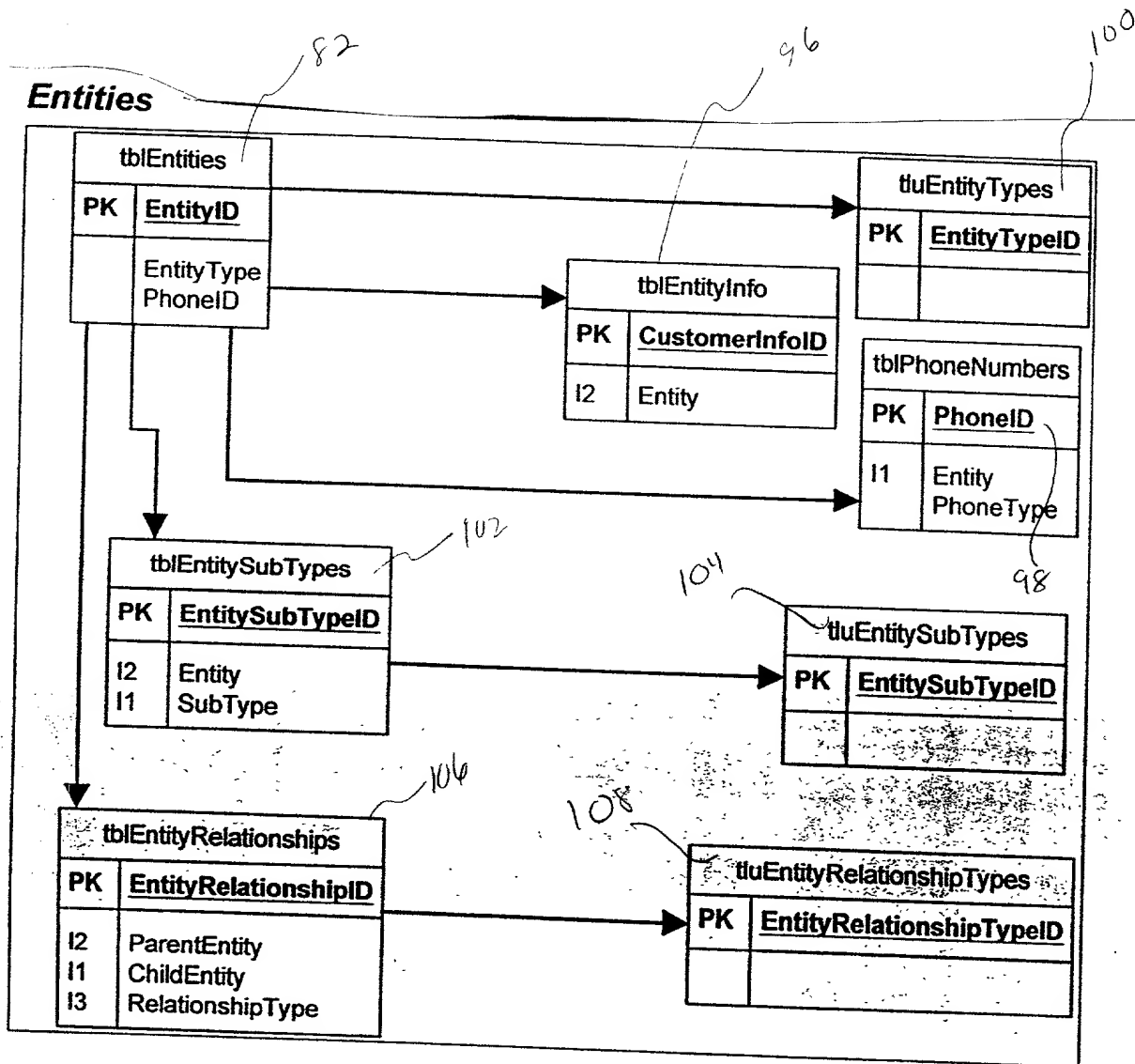


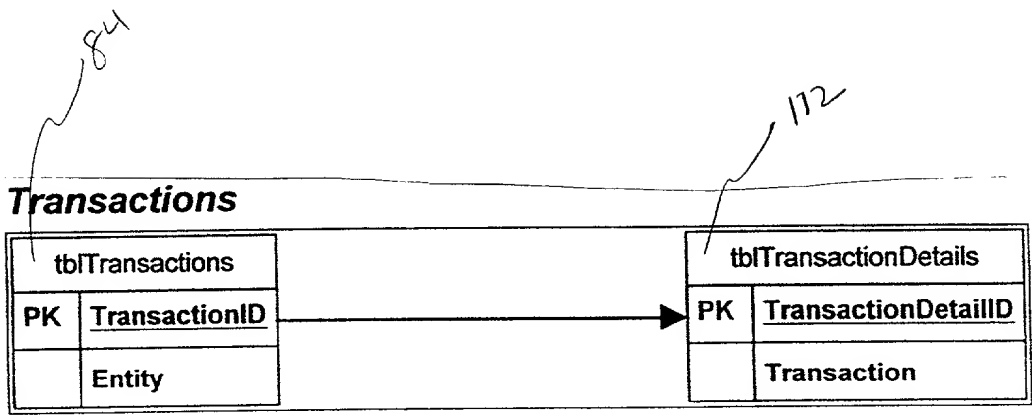
FIGURE 5

80



94

FIGURE 6



110

FIGURE 7

096445 032101

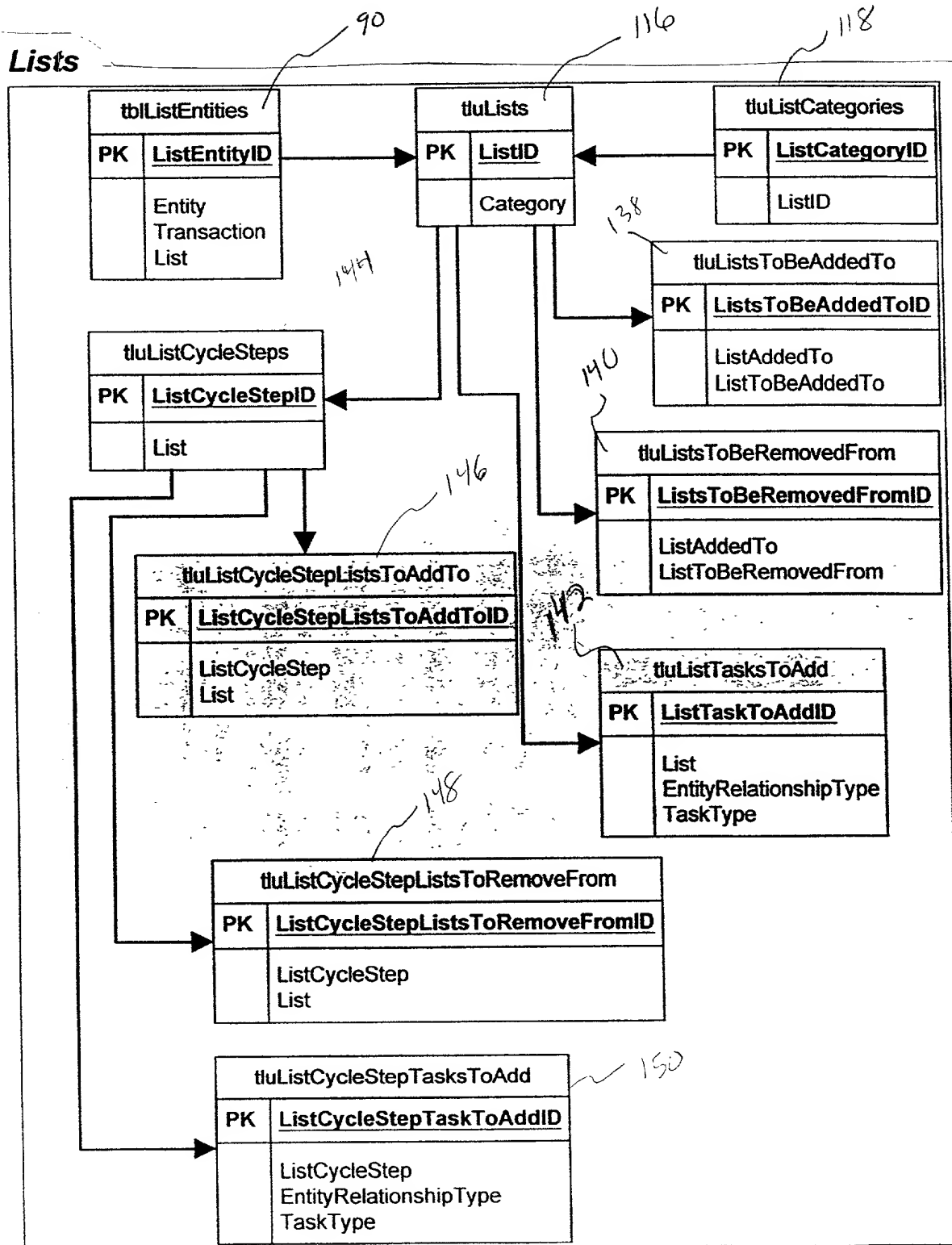


FIGURE 8

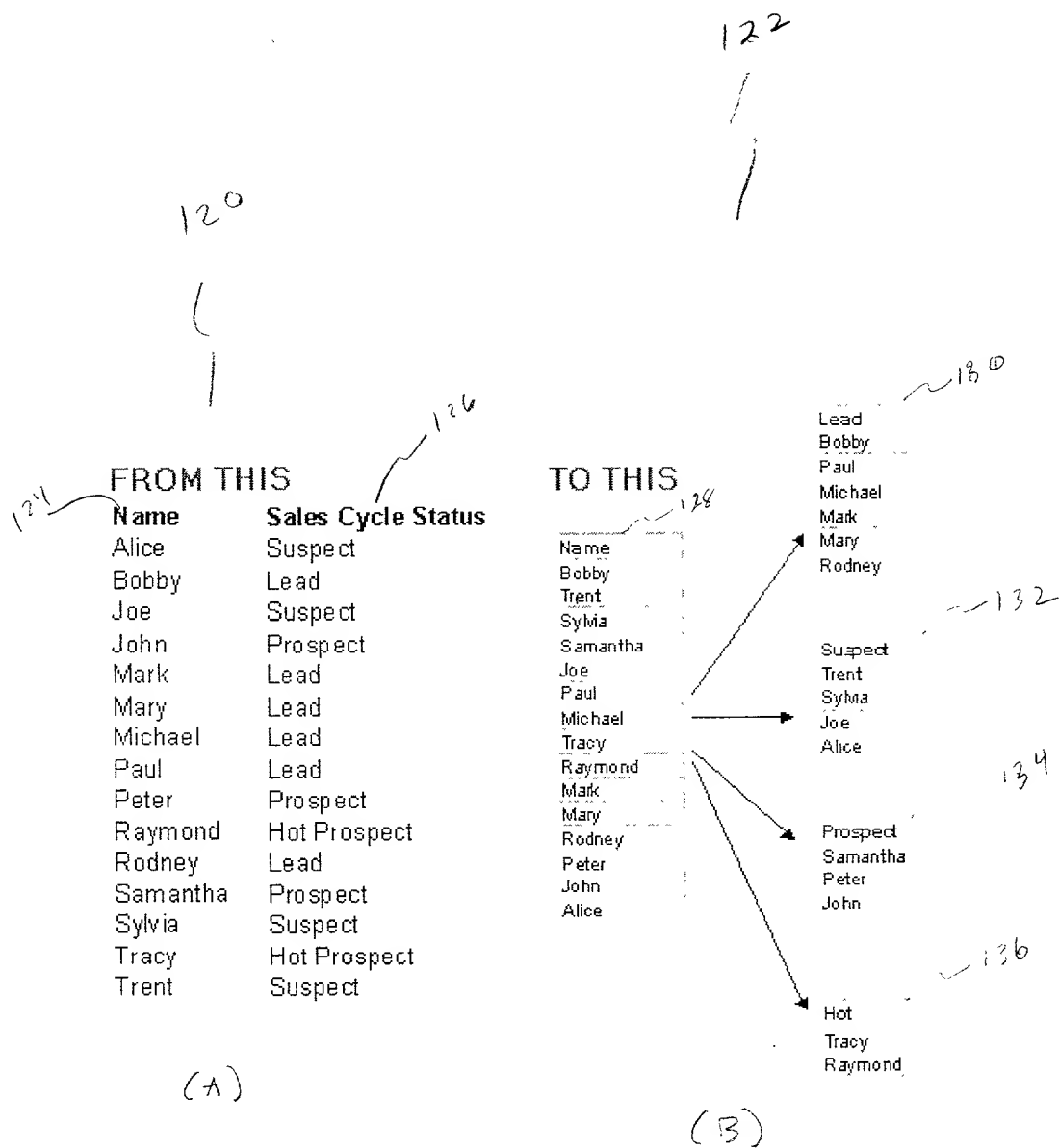


FIGURE 9

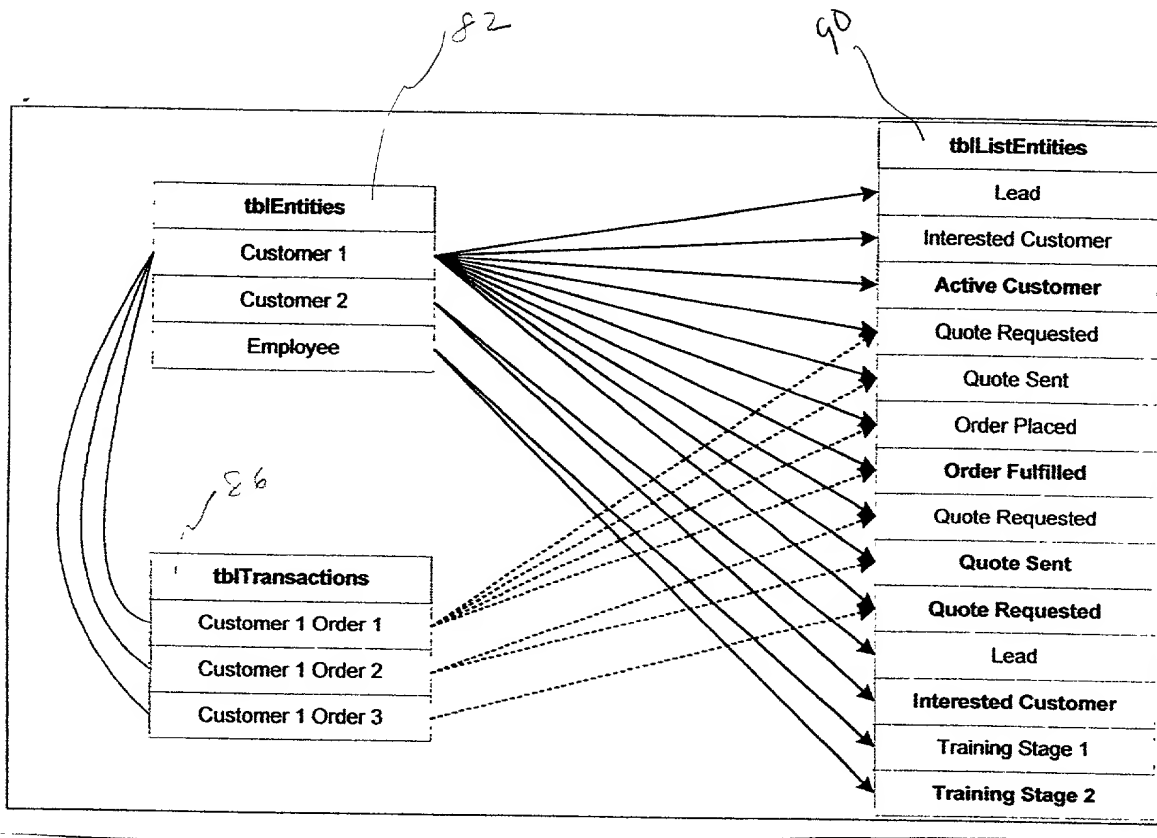


FIGURE 10

Each List can, in turn, trigger other list additions, deletions or actions immediately or after a user-definable amount of time - creating a easily specifiable and virtually limitless eProcess chain reaction.

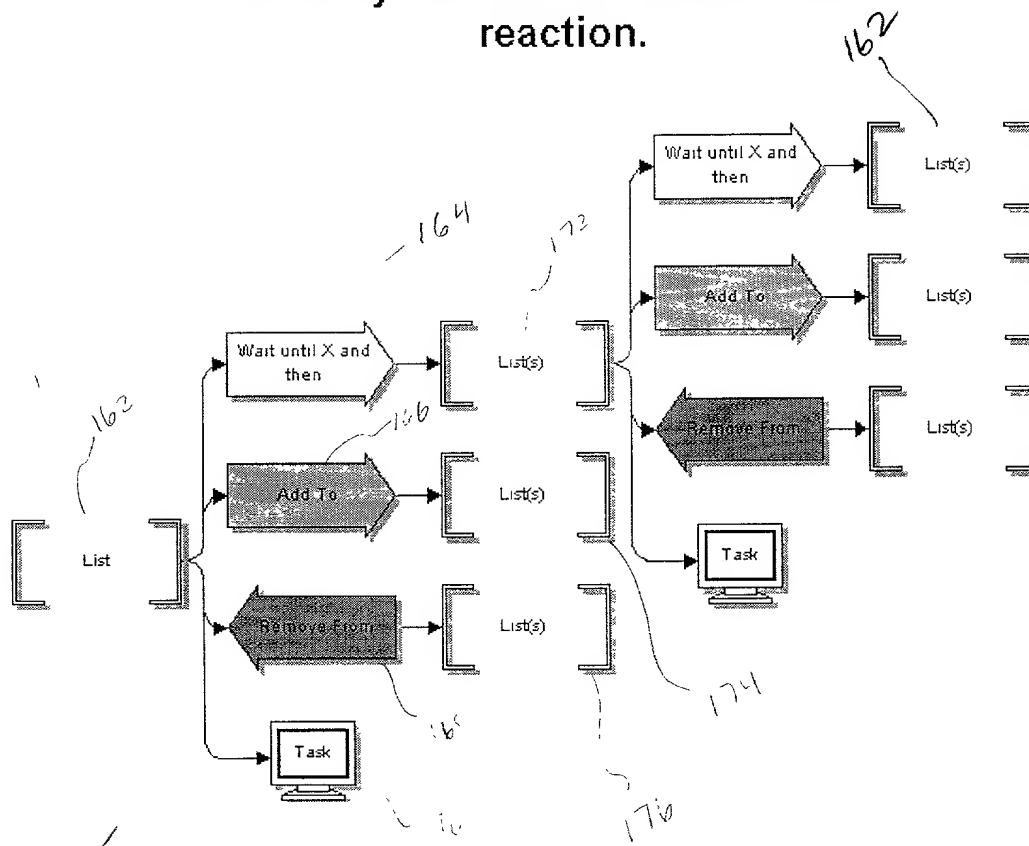


FIGURE 11

Lists Sequences

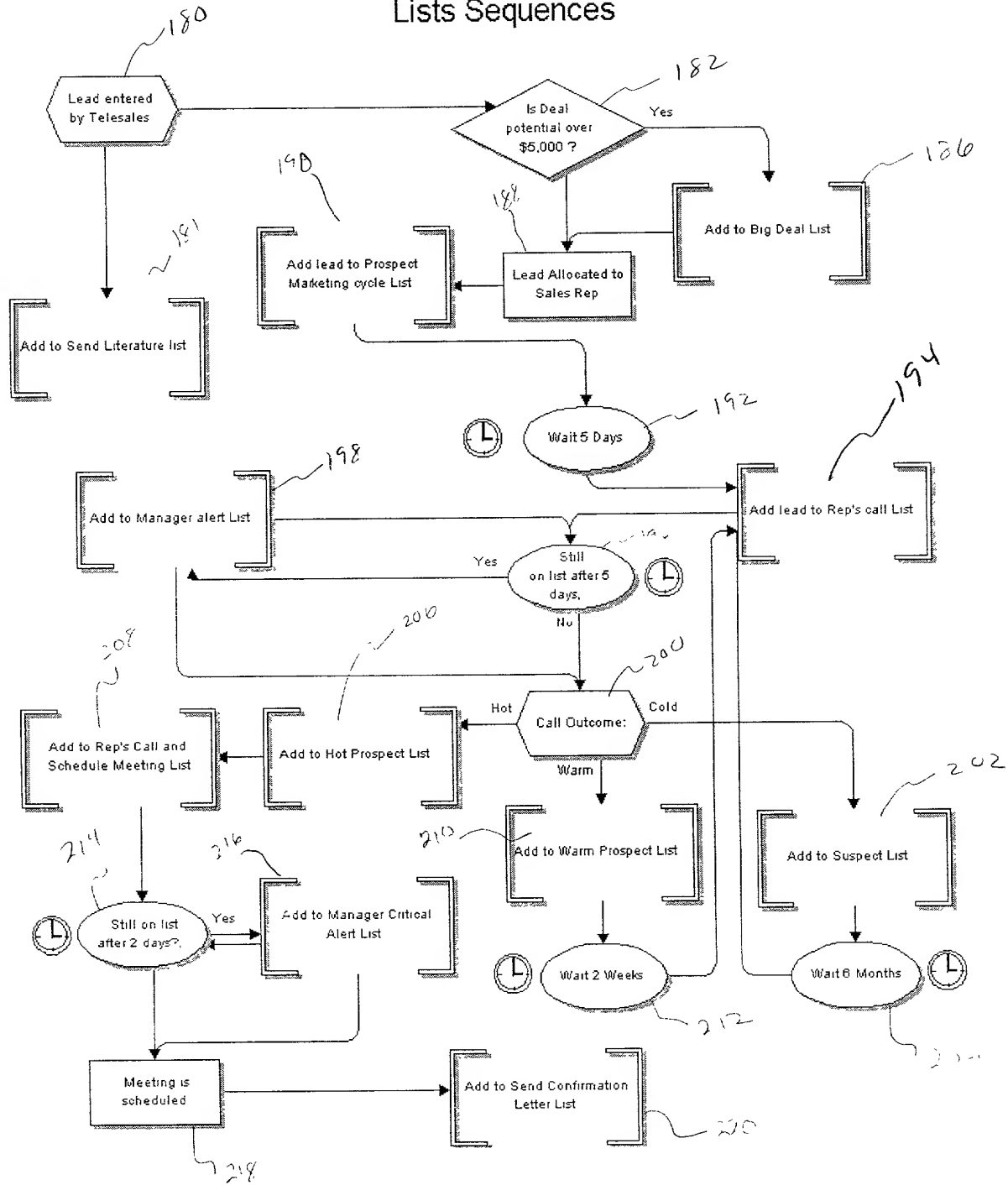


FIGURE 12

Process Definition

Process: Client Acquisition
Description: 230

Any process can be represented with steps and acceptable outcomes defined

Suspense Beam

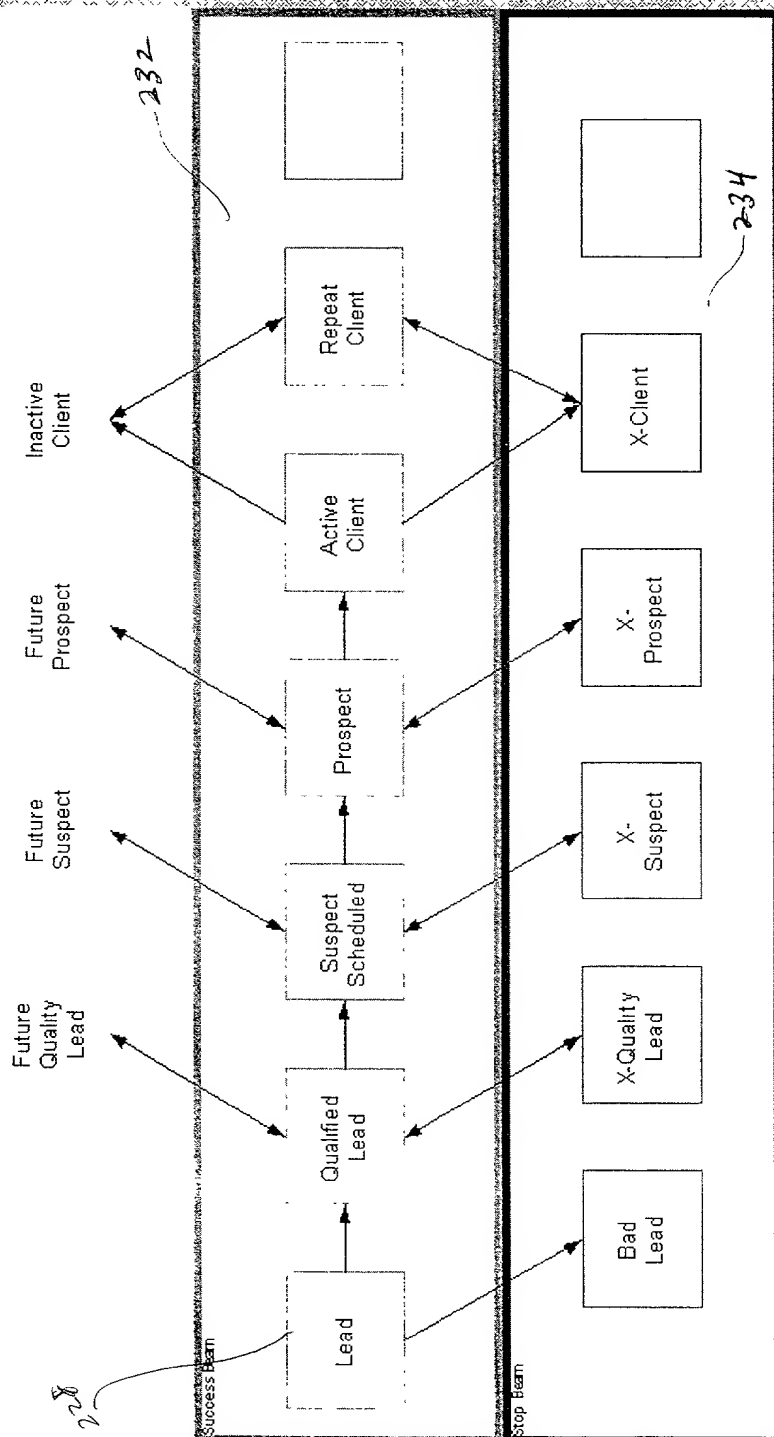


FIGURE 14

Rules Definition

Behind each step is a List Rule Worksheet

Lead

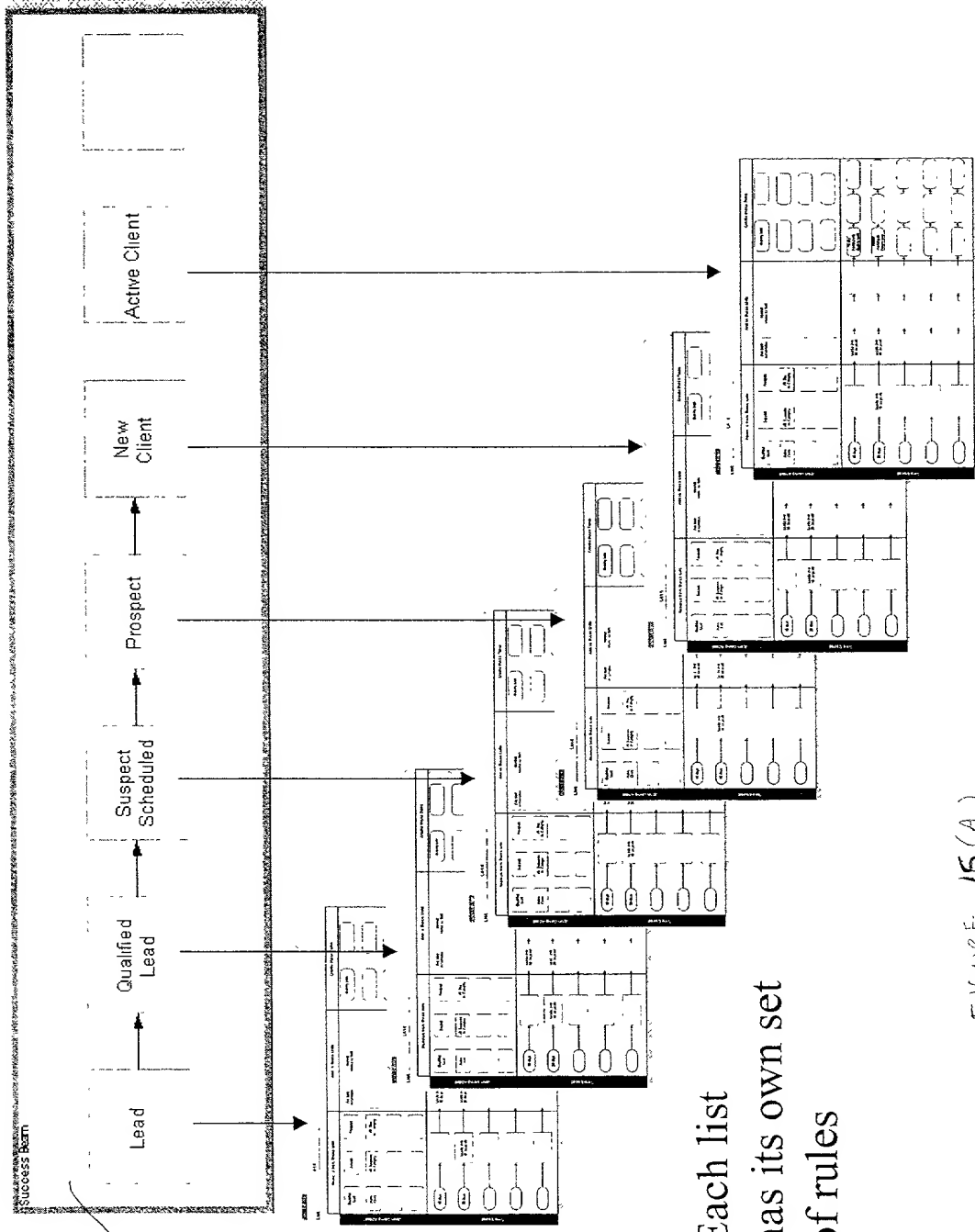
List

Remove from These Lists				Add to These Lists		Create these Tasks	
Qualified Lead	Suspect	Prospect	Get basic Information	Internal Memo to Staff	Qualify Lead		
Active Client	All Suspense in Category	All Stop in Category					
10 days			Leads over 10 days old		10 day Reminders to Qualify Lead		
20 days		Leads over 10 days old	Leads over 20 days old		Consider marking as Future Lead		

Upon Being Added

Time-Based

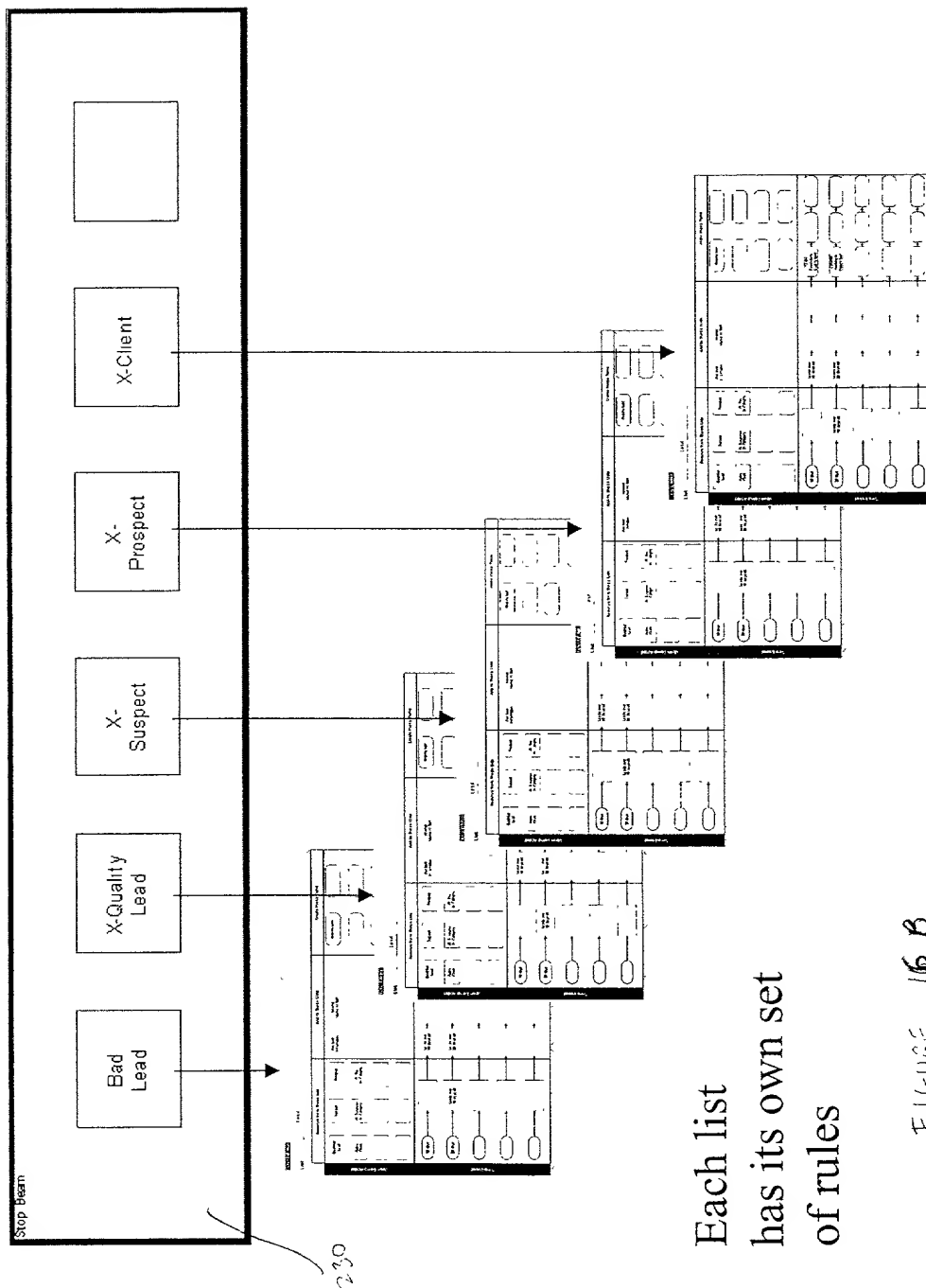
FIGURE 15



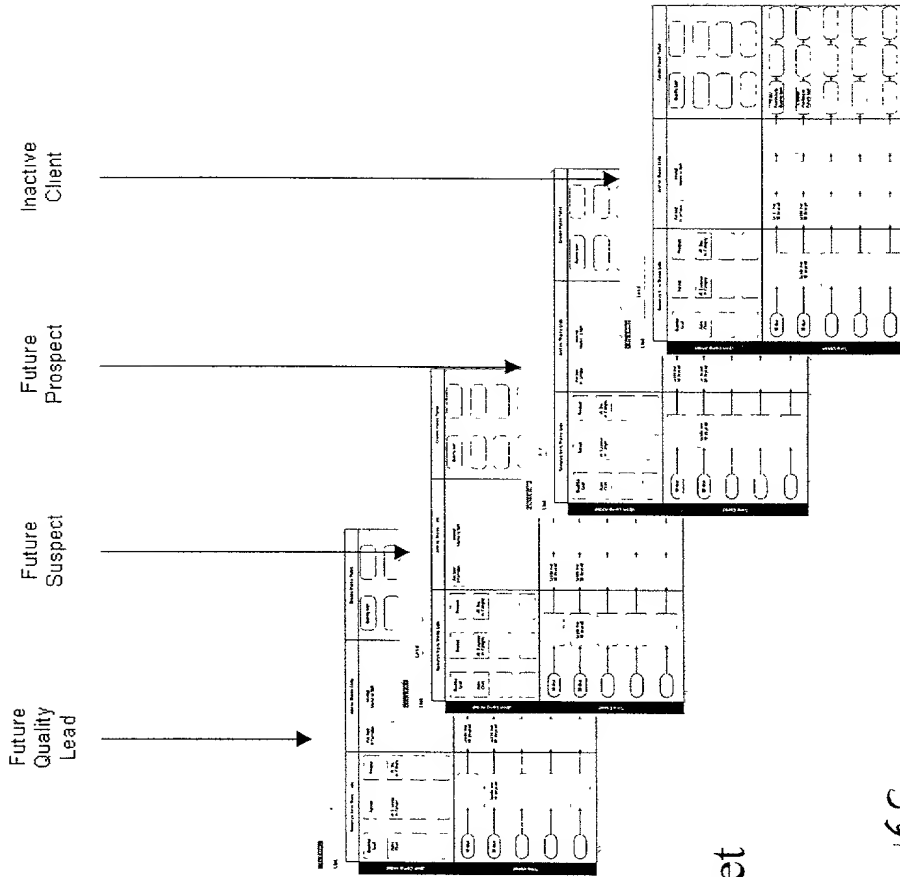
Each list
has its own set
of rules

FIGURE 15 (A)

232



Suspense Beam



Each list
has its own set
of rules

FIGURE 16C

234

The screenshot shows a Windows desktop environment. In the foreground, there is a window titled "Calendar". The window has a menu bar with options like File, Edit, View, Tools, Window, Help, and a search icon. Below the menu bar is a toolbar with icons for various calendar functions. The main area of the window displays a monthly calendar grid. The date 1st is highlighted, and it shows "Wednesday, January 1, 1997". To the right of the calendar grid, there are columns for "Subject", "Reference To", "Due Date", and "Assigned By". Several tasks are listed in the calendar, each with a small icon indicating its status or type.

The screenshot displays the AnyWorks application window. The title bar includes standard Windows icons and the text "AnyWorks". Below the title bar, there's a navigation pane on the left with icons for Home, Recent, Favorites, and a search icon. The main area shows a calendar for November 2000. The calendar has columns for days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and rows for weeks. Dates are displayed in a grid format.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

Figure 17

(c)

LEAD SYSTEM 10/20/01 1/01

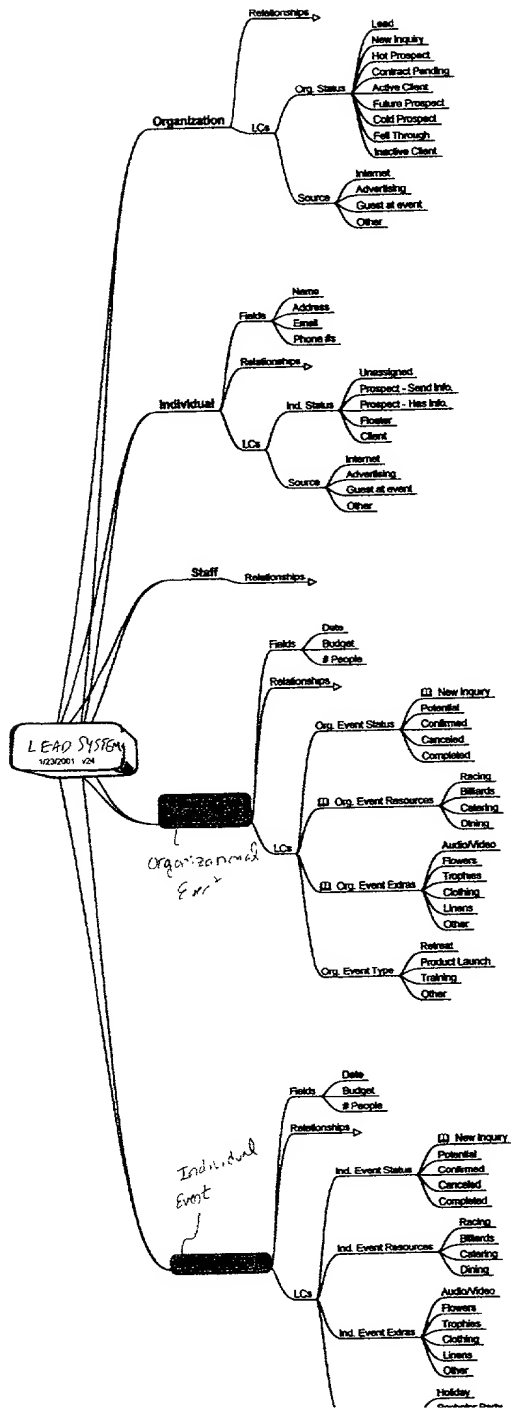


Figure 18

View As:

Long, Chris



[Requested On/By]



	Subject	Relates To	Due Date	Assigned By To
2	[No Subject]	Cardinal Distributors	✓	2 → Quast, Karen
3	Follow-up call	Logica Mobile Networks	-	
3	Payment follow-up	Corcoran Management	-	
3	follow-up	Don Law	-	
3	Summer outing	KCL Imaging	-	
3	June 13	Nixon Peabody	-	
3	Aug meeting	Reyes, Carlos	-	
3	follow up	Tweeter	-	
3	Please follow up to mailing	Firm Affairs Inc	✓	3 ← Quast, Karen
3	Please follow up to mailing	Abington Savings Bank	✓	3 ← Quast, Karen
3	Please follow up to mailing	Reyes, Carlos	✓	3 ← Quast, Karen
3	Ceridian 4-16-01	Ceridian	-	
3	follow up	Firm Affairs Inc	-	
3	Follow-up	Abington Savings Bank	-	
3	[No Subject]	Printex	-	
3	[No Subject]	WAN Architects	-	
3	incoming fax	Corcoran Management	-	
3	[No Subject]	Tweeter	-	
3	follow up	Roberts Animal Hospital	-	
3	Please call	Auspice Inc	-	3 ← Quast, Karen

Select All

(1 - 20 of 22) >>

Limit to 20

Go

Update

[Delegate To...]

Set Priority

To:

Defer

For:

or until

or undefer

FIGURE 19A



ON OFF



Active (on by default)



Active – deferred until time has expired (on by default)



Deferred until future date/time (off by default)



Show items that have been read (on by default)



Show items that haven't been read (on by default)



Show Self-appointed items (on by default)



Show Delegated items (on by default)



Show Received items (on by default)



Show open items (on by default)



Show items Marked-for-sign-off (on by default)



Show items Signed-off (off by default)



Show items that have been read by Requested Of/By (on by default)



Show items that haven't been read by Requested Of/By (on by default)

FIGURE 19B



Create task and link it to current page



Create another item (type of item depends on which page icon appears)



Convert current page to printable format



Save current changes



Download current entity information to Microsoft Outlook



Create an activity record and associate it to current page/entry



If view is anchored, then move to previous item



If view is anchored, then move to next item

FIGURE 19C

[a]⁺ e-process enablement TASKS

View As: Long, Chris

[Icons: Print, Refresh, Search, etc.] [Requested Of/By] [Icons: Check, Uncheck, etc.]

Subject	Relates To	Due Date	Assigned By/To
2 [] [No Subject]	Cardinal Distributors	✓	2 [] ⇒ Quest, Karen
3 [] June 13	Nixon Peabody	-	
3 [] Please follow up to mailing	Firm Affairs Inc	✓	3 [] ← Quest, Karen
3 [] Please follow up to mailing	Abington Savings Bank	✓	3 [] ← Quest, Karen
3 [] Please follow up to mailing	Reyes, Carlos	✓	3 [] ← Quest, Karen
3 [] [No Subject]	Printex	-	
3 [] [No Subject]	WAN Architects	-	
3 [] Please call	Auspice Inc	-	3 [] ← Quest, Karen
3 [] Please call	Protor & Gamble	-	3 [] ← Quest, Karen
3 [] Please follow up to mailing	Rai-Mar Salon & Spa	-	3 [] ← Quest, Karen

Select All (1 - 10 of 10) Limit to 20 Go

Update [Delegate To.] Set Priority To: Defer For: or until or undefer

FIGURE 20

Assigned To: Piasecki, Richard By Quast, Karen

Priority: 3 (Assigned To Priority - 3)

Description: 25 - 100 people Date undetermined

Due Date:

[Goto Page]

Interested Parties

Comments and Actions

Date	By	Comment
03/01/01 04:34 PM	Piasecki, Richard	The task was marked for sign-off on 3/1/2001 4:34:25 PM
03/01/01 04:34 PM	Piasecki, Richard	End of the month over, sales meeting on monday will call
02/26/01 07:40 PM	Quast, Karen	The task was reactivated on 2/26/2001 7:40:11 PM
02/26/01 04:14 PM	Piasecki, Richard	The task was marked for sign-off on 2/26/2001 4:14:13 PM
02/26/01 04:14 PM	Piasecki, Richard	Site visit (?) with Pete Cronin Thurs PM
02/14/01 01:24 PM	Quast, Karen	Please give me status on this RJ wants to follow this mailing
02/14/01 01:24 PM	Quast, Karen	The task was reactivated on 2/14/2001 1:24:04 PM
02/14/01 01:00 PM	Piasecki, Richard	The task was marked for sign-off on 2/14/2001 1:00:25 PM
02/14/01 01:00 PM	Piasecki, Richard	Invited him in for a SV this week, Fri no confirmation yet
02/14/01 11:39 AM	Quast, Karen	is site visit scheduled?
02/14/01 11:39 AM	Quast, Karen	The task was reactivated on 2/14/2001 11:39:12 AM
02/14/01 09:33 AM	Piasecki, Richard	may come in for a site visit 2-16
02/09/01 10:42 AM	Piasecki, Richard	The task was marked for sign-off on 2/9/2001 10:42:04 AM
02/09/01 10:42 AM	Piasecki, Richard	Great Lead from mailer, will come in for site visit, incentive event in MAR
02/08/01 10:29 PM	Quast, Karen	The task was delegated

Comment:

Add Comment

Subdelegated Tasks

P	SQS	URR	URT	Subject	Relates To	Assigned To	Due Date
---	-----	-----	-----	---------	------------	-------------	----------

FIGURE 21

(a)^x

e-process enablement **TASK**



Subject: Sample Task

Relates To: Earle, Gordon

Delegate To: [Delegate To...]

Priority: 3

Description: [Text area with up and down arrows]

Due Date: [Text area]

Defer: For [Defer For...] or until [Text area]

Private: ☐

[Sign Off]

Interested Parties

Comments and Actions

Date	By	Comment
------	----	---------

Comment: [Text area with up and down arrows] [Add Comment](#)

Subdelegated Tasks

P	SOS	URB	URT	Subject	Relates To	Assigned To	Due Date
---	-----	-----	-----	---------	------------	-------------	----------

FIGURE 28